

- **General**
 - Full name, social security number, and date of birth of taxpayer, spouse, and all dependents.
 - Bank account information for direct deposit of tax refunds and payment of all taxes.
 - Prior year tax return (first year clients only).
 - Settlement statements for any real estate transaction - purchase, sale or refinance.
- **Income**
 - W-2's
 - Final paystub of year.
 - 1099-INT – Interest income
 - 1099-DIV – Dividend income
 - 1099-B – stock transactions.
 - 1099-R's for retirement plan/pension distributions.
 - 1099-SSA's for social security benefits.
 - 1099-G's for state tax refunds, unemployment benefits.
 - W-2G's for gambling winnings.
 - K-1's from S-corporations, partnerships, trusts.
- **Deductions**
 - Form 1098 - mortgage interest on real estate.
 - Form 1098 – interest on new vehicle purchase.
 - New vehicle purchase document.
 - Real estate taxes.
 - Personal property tax (ad valorem) on automobiles, boats, etc.
 - Charitable contributions - cash and non-cash.
 - Medical expenses.
 - Individual insurance premiums.
 - Form 1095-A - Marketplace insurance.
 - Prescription drugs.
 - Doctor, dental, hospital, etc.
- **Adjustments/credits**
 - Form 1098-T - higher education expenses.
 - Form 1098-E - student loan interest.
 - Form 5498 - IRA contributions.
 - Form 5498-SA – HSA contributions.
 - Form 1099-SA – HSA distributions.
 - 529 plan contributions.
 - Educator expenses.
 - Child care expenses.
 - Amount paid.
 - Provider name, address, tax ID#.
 - Estimated tax payments.
- **Business**
 - See separate Business Summary
- **Rental property**
 - Settlement statement from purchase.
 - See separate Rental Summary.